

# FIDUCIARY BOARD

## Meeting Agenda – Thursday, May 11, 2017

Arizona Supreme Court -1501 West Washington Street

Phoenix, Arizona 85007 - 10:30 A.M. Conference Room 109

General Inquiries Call: 602-452-3378 (Certification and Licensing Division Line)

Members of the Public May Attend Meeting in Person

---

For any item listed on the agenda, the Board may vote to go into Executive Session for advice of counsel and/or to discuss records and information exempt by law or rule from public inspection, pursuant to the Arizona Code of Judicial Administration, Code Section 1-202(C).

---

**CALL TO ORDER .....** *Deborah Primock, Chair*

**1) REVIEW AND APPROVAL OF MINUTES.....** *Deborah Primock, Chair*

*1-A: Review, discussion and possible action regarding the regular session minutes of the meeting held on March 9, 2017.*

*1-B: Review, discussion and possible action regarding the regular session minutes of the interim meeting held on April 10, 2017.*

**2) PENDING COMPLAINTS/RENEWAL OF LICENSURE.....** *Division Staff*

*2-A: Review, discussion and possible actions regarding complaint number 14-0011 involving license holder, Kay Kozak.*

*2-B: Review, discussion and possible action regarding complaint number 14-0012, involving license holder, Fred Brinckerhoff.*

*2-C: Review, discussion and possible action regarding complaint number 16-0013, involving license holder, Donna Allison-Howard.*

**3) INITIAL LICENSURE AND ELIGIBILITY.....** *Division Staff*

*3-A: Review, discussion and possible action regarding the following applications for initial individual and business licensure:*

- 1. Susan Pratt*
- 2. Kimberlie Musselman*
- 3. Zen Freelance Fiduciary Solutions, LLC*
- 4. Eric Haley*

5. Andrew Stone
6. Rochelle Pones
7. Vikki Whipple
8. Yvonne Stallings

**4) RENEWAL OF LICENSURE APPLICATIONS..... *Division Staff***

*4-A: Review, discussion and possible action regarding the following applications for renewal of individual and business entity licensure:*

1. Arizona Care Advocates, PC (Debra McPherson)
2. Assurance Fiduciary & Financial Services, PLLC (Sarah Holcomb)
3. Bogutz & Gordon, PC (Craig Winsom)
4. Esteemed Life Solutions, LLC (Kelly Crane)
5. Jewish Family and Children's Services of Southern Arizona (Marshall Herron)
6. Fred Appel
7. Debra Bailey
8. Shannon Bennett
9. Mary Jane Dicresce
10. James Elliott
11. Nicole Escalante
12. Tamarah Fitzsimmons
13. Deborah Gilliland
14. Cathleen Gray
15. Patricia Grenier
16. Pamela Johnston
17. Mitchell Keamy
18. Michael Klecka
19. Ann Lander
20. Gregory Loughridge
21. Anna Marie Martelli
22. Gary Pope
23. Rashiel Salem
24. Diana Serna
25. John Tully
26. Pamela Walsma
27. Donna Benjamin
28. Charles Fuss
29. Shawnie Patterson
30. Catherine Robbins
31. Mary Trevillian
32. Catherine Yoshida-Corella
33. Maricopa County Public Fiduciary
34. Jennifer Murray

- 35. Maureen Edwards and Maureen Edwards, LLC
- 36. Naketa Ross

**5) LICENSURE AND ELIGIBILITY.....*Division Staff***

*5-A: Review, discussion and possible action regarding the request for an extension to complete continuing education requirements from licensee, Judy Nicholson.*

**6) ADMINISTRATIVE ISSUES ..... *Division Staff***

*6-A: Update on subcommittee to review possible Code changes involving guidelines concerning bankruptcies and other financial disclosure issues.*

**CALL TO THE PUBLIC .....*Deborah Primock, Chair***

**ADJOURN.....*Deborah Primock, Chair***